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# Case Assignment and CBMS Reports

CBMS Project 2349



# Introductions

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# Overview

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- This training will help eligibility workers understand the changes made within this change. These changes include:
  - System Modifications
    - Case Assignment
    - Special Action
    - Manage Inter County Transfer
    - Authorization Eligibility
      - Trigger for CHP+
  - New CBMS Pending Report



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# System Modifications



# Case Assignment

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- **Prior** to this implementation
  - The “Select MA Site Office” window displays and county workers were to select the appropriate Medical Assistance (MA) Site as the Office



# Case Assignment

- **With** this implementation
  - The “Select MA Site Office” logic will be removed from PEAK and CBMS window
  - Case Assignment will be assigning the CHP+ program to the intake caseload of the eligibility site until the CHP+ program is approved and authorized or pending an enrollment fee
  - All other logic will remain the same





## PEAK Application Details



### Case Type

☐ Existing Case ☒ New Case

### Cash Assistance Program Type

☐ Colorado Works ☐ Adult Financial Assistance

### Select Medical Assistance Site Office

County:

Office:

**OLD SCREEN**



## PEAK Application Details



### Case Type

☐ Existing Case ☒ New Case

### Cash Assistance Program Type

☐ Colorado Works ☐ Adult Financial Assistance

**NEW SCREEN**



# Case Assignment

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- Automatic Case Assignment will be modified to assign the FM/CHP+ program to the intake caseload of the county/office of the eligibility worker taking the application



# Inquire on Case Information



Case

Number:

Name:

Programs

Status:

Pending

Status Date:

11/21/2011

Pending Alerts:

2

WP [Y/N]:

N

**Programs**

Application List

Case Members

Case Payee

PR Dates

Member Dates

Contact Summary

e	RRR Begin	RRR End	Verification Due [Y/N]	User ID	User County	User Office	User Name	Caseload
	11/2011	00/0000	N			Adams - HS		IN
	11/2011	00/0000	N			Adams - HS		IN

Eligibility Results...

Closure Reasons...

B/BR...

Program Members...

# Questions?



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# Special Action



# Special Action

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- **Prior** to this implementation
  - Special Action automatically created a pending FM or CHP+ program back to the original application date of an existing case



# Special Action

- **With** this implementation
- Special Action logic will be modified to
  - Create a new application (AI) for the FM or CHP+ program. The AI will be copied from the previous application of the HLPG
  - Assign the pending program to the transfer caseload of the eligibility site worker who is currently responsible for the ongoing case maintenance of the existing approved medical program



# Special Action

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—The following information will be system generated for the FM or CHP+ AI being created by Special Action

- Application ID = New Application ID
- Application Type = Initial/New
- Application Source = Special Action



# Special Action

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- Application Date = System Date (Date the Special Action occurs)
- Application Entry Date= System Date (Date the Special Action occurs)
- Application Sign Date = System Date (Date the Special Action occurs)
- Application Status Signed = Signed





# Special Action and Application Initiation

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- Example 1
  - Ongoing FM case with Mom and 2 children, CHP+ denied/terminated. Family reports increase in income for 11/2011. EDBC is run on 11/21/11 – CBMS runs for 11/2011, 12/2011, and 1/2012. Child 1 fails for over income in FM for 1/2012, Mom and Child 2 pass in FM (ongoing)



# Special Action and Application Initiation

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- Special Action will add CHP+ with request date 1/1/12. The application date, entry date, and signed date 11/21/11. The application source is “Special Action”, application type “Initiate/New”, and application status “Signed”





## Search on Case Information

### Search Criteria

Case #:

Application #:

### Case User

Name:

Find...

Case Status:

From:

To:

Search

### Search Results

Case #	Application #	Case Name	Status	Application Date	Application Source	Application Type
			Open	11/21/2011	Special Action	Initial/New

More

Case Details...



## Application Summary



### Application

**App ID:**

4763741

**Application Date:**

11/21/2011

**Application Status:**

Signed

**Case ID:**

**Input Date:**

11/21/2011

**Input User:**

**Applicant Name:**



### Address

### Programs Requested

Program Name	Program Status	Due Date
Childrens Health Plan Plus	Pending	01/05/2012



## Applicant Information



### Detail

#### Application

\*Date:

11/21/2011

\*Type:

Initial/New

Input Date:

11/21/2011

\*Source:

Special Action

Location:

STATE OF COLORADO/STATE - H

#### Applicant Details

\*Last Name:

\*First Name:

Middle Name:

X

Suffix:

\*Gender:

Female

DOB:

SSN:

#### Language

\*Primary:

English

\*Secondary:

English

Interpreter:



Yes



No



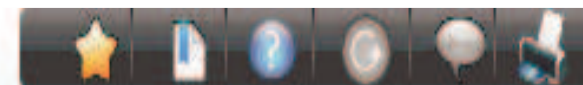
## Programs Requested



### Programs Requested

- |  |   |  |
|--|---|--|
| <input type="checkbox"/> Adult Financial Assistance            | <input type="checkbox"/> Adult Medical Assistance     | <input type="checkbox"/> Adult Protective Services |
| <input checked="" type="checkbox"/> Childrens Health Plan Plus | <input type="checkbox"/> Colorado Works               | <input type="checkbox"/> Disaster Food Stamps      |
| <input type="checkbox"/> Family Medical Assistance             | <input type="checkbox"/> Family Preservation          | <input type="checkbox"/> Food Stamps               |
| <input type="checkbox"/> Long Term Care                        | <input type="checkbox"/> Medicare Part D LIS          | <input type="checkbox"/> Medicare Savings Program  |
| <input type="checkbox"/> NonMonetary Services                  | <input type="checkbox"/> Presumptive Eligible Medical |  |

## Application Status



### Status

#### \*Application Signature Status:

Signed Date:

Case Number:

☒ Signed

11/21/2011

☐ Unsigned

☐ Refuse to Sign

☐ Signature on File

☐ Signature not Required

#### Application Comments:

ABC

Current Size = 0 characters (256 characters max.)

# Special Action-Transfer Caseload

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- Example 1
  - FM is approved and CHP+ is denied. Both are assigned to the same county. Special Action is triggered and pends the CHP+ program. The CHP+ program is assigned to the transfer caseload of the county that is assigned to the approved FM program





# Special Action-Transfer Caseload

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- Example 2
  - FM is approved and assigned to the county and CHP+ is denied and assigned to an MA Site. Special Action is triggered and pends the CHP+ program. The CHP+ program is assigned to the transfer caseload of the county that is assigned to the approved FM program



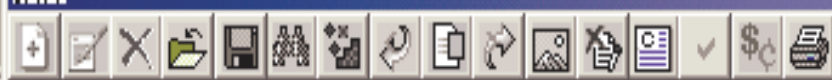
# Special Action-Transfer Caseload

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- Example 3
  - CHP+ is approved and assigned to the CHP+ vendor, and FM is denied and assigned to a county. Special Action is triggered and pends the FM program. The FM program is assigned to the transfer caseload of the CHP+ vendor



# Inquire on Case Information ? X



Case

Number:  Name:

Status:  Status Date:  Pending Alerts:  WP [Y/N]:

## **Programs**

e	RRR Begin	RRR End	Verification Due [Y/N]	User ID	User County	User Office	User Name	Caseload
	03/2005	00/0000	N					
	05/2011	05/2012	N					<input type="text" value="ON"/>
	03/2005	01/2011	N					
	05/2010	00/0000	N					<input type="text" value="TR"/>
	04/2010	09/2010	N					
	10/2005	00/0000	N					
	08/2004	00/0000	N					
	03/2005	00/0000	N					

# Questions?



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# Manage Inter County Transfer



# Manage Inter County Transfer

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- Inter County Transfer process has been modified to
  - Transfer only the programs that are assigned to a county/ MA site
  - Assign cases to the transfer caseload of the receiving county/MA site



# Manage Inter County Transfer

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- If the CHP+ and FM application are assigned to a county and are transferred to another county, both programs will be transferred to the transfer caseload of the receiving county



# Manage Inter County Transfer

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- If the CHP+ and FM application are assigned to an MA site and are transferred to another MA site or county, both programs will be transferred to the transfer caseload of the receiving MA site or county
  - The CHP+ program will remain with the CHP+ vendor





# Manage Inter County Transfer

- All programs assigned to an MA Site will be left assigned to the MA Site when an Inter County transfer is performed by a State or County user
  - **Example** - If the CW and FS application are assigned to the county and CHP+ and FM are assigned to the CHP+ vendor, when a state or county user initiates the transfer to another county, only the CW and FS will be assigned to the receiving county. CHP+ and FM will not be transferred to the receiving county



# Questions?



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# Authorize Eligibility



# Authorize Eligibility

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- During the Authorization of FM and CHP+ programs, CBMS will check if either FM or CHP+ is selected for authorization. If either FM or CHP+ is selected, then CBMS will auto select both programs to authorize





## Authorize Eligibility Program Benefit

Case

Number:

Name:

Programs

Status:

Pending

Status Date:

11/21/2011

Pending Alerts:

6

WP [Y/N]:

N

Program Group	Payment Month	Payment Type	Gross Benefit Amt.	Recoupment Amt.	Eligibility Status	Authorization Status	Select Author
Family Medical As	2011/11	Initial Benefit	\$ .00	\$ .00	DENIED	Pending	<input type="checkbox"/>
Family Medical As	2011/12	Initial Benefit	\$ .00	\$ .00	DENIED	Pending	<input type="checkbox"/>
Family Medical As	2012/01	Regular Benefit	\$ .00	\$ .00	DENIED	Pending	<input type="checkbox"/>
Childrens Health P	2011/11	Initial Benefit	\$ .00	\$ .00	PASS	Pending	<input checked="" type="checkbox"/>

**Only CHP+ is selected**

Issuance Type:

Issuance Method:

Pick-up Location:

Supervisor Approval

Requested [Y/N]:

N

Disposition Status:

Approved

Disposition Date:

00/00/0000

Payee Name(s):

Appeal/Cont Benes:

☐

Discontinuance

Date:

00/00/0000

Mail to

☒ First Payee Address

☐ Second Payee Address

Amount

Gross Benefit:

\$ .00

Recoupment:

\$ .00

Net Benefit:

\$ .00

Detail...

Supervisor Action...

Authorize

Claim...

Select Provider...

Reasons...

Special Payments...



## Authorize Eligibility Program Benefit

Case

Number:

Name:

Programs

Status:

Pending

Status Date:

11/21/2011

Pending Alerts:

6

WP [Y/N]:

N

Program Group	Payment Month	Payment Type	Gross Benefit Amt.	Recoupment Amt.	Eligibility Status	Authorization Status	Select Author
Family Medical As	2011/11	Initial Benefit	\$ .00	\$ .00	DENIED	Authorized	<input checked="" type="checkbox"/>
Family Medical As	2011/12	Initial Benefit	\$ .00	\$ .00	DENIED	Authorized	<input checked="" type="checkbox"/>
Family Medical As	2012/01	Regular Benefit	\$ .00	\$ .00	DENIED	Authorized	<input checked="" type="checkbox"/>
Childrens Health P	2011/11	Initial Benefit	\$ .00	\$ .00	PASS	Authorized	<input checked="" type="checkbox"/>

Issuance Type:

Pick-up Location:

Disposition Status:

Payee Name(s):

Appeal/Cont Benes:

☐

Discontinuance

Date:

11/30/2011

Mail to

☒ First Payee Address

☐ Second Payee Address

Detail...

Supervisor Action...

Authorize

Claim...

Select Provider...

Reasons...

Special Payments...

**CBMS will auto  
select FM**

CBMS



Message Code : 155

Description : Authorization was successful.

OK

# Trigger for CHP+

- The CHP+ program will automatically transfer to the CHP+ vendor's transfer caseload when
  - Approved and authorized
- The CHP+ program will automatically transfer in a nightly Batch process to the CHP+ vendor's transfer caseload when
  - Pending an enrollment fee



# Questions?





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# CBMS Pending Reports



# Pending Reports

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- **Prior** to this implementation
  - Eligibility sites utilized the Exceeding Processing Guidelines report to process cases that are pending in CBMS
    - The cases were already exceeding the processing timeline



# Pending Reports

- **With** this implementation
  - Two new reports were created listing all CBMS individuals/cases that are pending
    - This will help eligibility sites identify their cases before they are exceeding processing timelines



# Pending Reports

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- Two new pending reports
  - Detailed Timely Processing of Medical Applicant Determinations
  - Detailed Timely Processing of Medical Applicant Redeterminations
- Both reports are available in
  - Adhoc
  - CVS
  - PDF



# Detailed Timely Processing of Medical Applicant Determinations

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- Purpose:
  - Create a listing of all new CBMS individuals/cases that are pending
- Location:
  - Available in Cognos > “Application Reports” folder
    - Frequency – Weekly on Sunday
- Security Access:
  - County supervisors, county workers, MA sites, and state supervisors





## Detailed Timely Processing of Medical Applicant Determinations

Last Modified On: Nov 21, 2011



Office Name	Unit Name	Current Assigned User	Case Number	Head of Household Name	Application Number	High Level Program Group (HLPG)	Program Status	Application Date	Application Create Date	App Created by (User)	Aged Days (day() old)	Case Status	Pending Reason	Application Source	Rescind Date	Due in # of Days
	Assistance Payments	Admin2				FM	PE	07/01/2010	12/15/2010		508	PE	EDBC not run on this case	Mail-in		-483
		Admin2				FM	PE	07/15/2010	12/22/2010		494	PE	EDBC not run on this case	Mail-in		-449
		Admin2				FM	PE	08/05/2010	01/04/2011		473	PE	EDBC not run on this case	MA-Site		-428
		Admin2				FM	PE	08/11/2010	12/21/2010		467	PE	EDBC not run on this case	Mail-in		-422
		Admin2				FM	PE	08/15/2010	01/07/2011		463	PE	EDBC not run on this case	MA-Site		-418
		Admin2				FM	PE	08/16/2010	12/17/2010		462	PE	EDBC not run on this case	MA-Site		-417
		Admin2				FM	PE	08/18/2010	02/10/2011		460	OP	EDBC not run on this case	Mail-in		-415
		Admin2				FM	PE	08/18/2010	02/07/2011		460	PE	case incomplete for this HLPG.	Mail-in		-415
		Admin2				FM	PE	08/19/2010	02/07/2011		459	PE	case incomplete for this HLPG.	Mail-in		-414

Prompt Page

County

\*

ADAMS

ALAMOSA

ARAPAHOE

ARCHULETA

BACA

BENT

BOULDER

CHAFFEE

CHEYENNE

CLEAR CREEK

CONEJOS

Office Name

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Adams - HSB

Unit Name

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CW/FamMed-I

Current Assigned User

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[Select all](#)

[Deselect all](#)

# Detailed Timely Processing of Medical Applicant Redeterminations

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- Purpose:
  - Create a listing of all redetermination CBMS individuals/cases that are pending
- Location:
  - Available in Cognos > “Public RRR Reports” folder
  - Monthly report will run on the 6th of every month
- Security Access:
  - County supervisors, county workers, MA sites, and state supervisors







## Detailed Timely Processing of Medical Applicant Redeterminations

Last Modified On : Nov 09, 2011



County	Office Name	Unit Name	User who Started RRR	Case Number	Head of Household Name	Current Assigned User	Application Number	High Level Program Group (HLPG)	Program Status	Aged Days (day (s) old)	RRR Month	Packet Received Date	RRR Status Date	RRR Status	Pending Reason	Application Source	Due In # of Days
								FM	Approved	8	Dec-11		11/01/2011	Generated	approved for Family Medicaid	Walk-in	52

## Prompt Page

<p><b>County</b></p> <p>* ADAMS ALAMOSA ARAPAHOE ARCHULETA BACA BENT BOULDER CHAFFEE CHEYENNE CLEAR CREEK CONEJOS</p>	<p><b>Office Name</b></p> <p>* Adams - HSB</p>
<p><b>Unit Name</b></p> <p>* CW/FamMed-I</p>	<p><b>Current Assigned User</b></p> <p>* <input checked="" type="checkbox"/> I <input checked="" type="checkbox"/> I <input checked="" type="checkbox"/> r <input checked="" type="checkbox"/> r <input checked="" type="checkbox"/> r <input checked="" type="checkbox"/> r <input checked="" type="checkbox"/> s <input checked="" type="checkbox"/> s</p> <p><a href="#">Select all</a> <a href="#">Deselect all</a></p>

Cancel

< Back

Next >

Finish



## Detailed Timely Processing of Medical Applicant Redeterminations - Ad hoc

Last Modified On : Nov 29, 2011



County	Office Name	Unit Name	User who Started RRR	Case Number	Head of Household Name	Current Assigned User	Application Number	High Level Program Group (HLPG)	Program Status	Aged Days (day (s) old)	RRR Month	Packet Received Date	RRR Status Date	RRR Status	Pending Reason	Application Source	Due in # of Days
							2244716	FM	Approved	59	Nov-11		Oct 1, 2011 12:00:00 AM	Generated	EDBC did not run on this case	Mail-in	1
							3492942	FM	Approved	59	Nov-11		Oct 1, 2011 12:00:00 AM	Generated	EDBC did not run on this case	Walk-in	1
							3047328	FM	Approved	59	Nov-11		Oct 1, 2011 12:00:00 AM	Generated	EDBC did not run on this case	Mail-in	1
							4183200	FM	Approved	59	Nov-11		Oct 1, 2011 12:00:00 AM	Generated	EDBC did not run on this case	Walk-in	1
							1656948	FM	Approved	59	Nov-11		Oct 1, 2011 12:00:00 AM	Generated	EDBC did not run on this case	Walk-in	1
							3532675	FM	Approved	28	Dec-11		Nov 1, 2011 12:00:00 AM	Generated	EDBC did not run on this case	Mail-in	32
							3834409	FM	Approved	28	Dec-11		Nov 1, 2011 12:00:00 AM	Generated	EDBC did not run on this case	Walk-in	32
							3839921	FM	Approved	28	Dec-11		Nov 1, 2011 12:00:00 AM	Generated	EDBC did not run on this case	Walk-in	32
							1808151	FM	Approved	28	Dec-11		Nov 1, 2011 12:00:00 AM	Generated	EDBC did not run on this case	Walk-in	32

# Questions?

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# Reminders

- Add detailed case comments each time there is an update made to your cases
- Review and resolve all Alerts timely
- Follow the field definition guide and all data entry documents located on the Department of Human Services Web Portal or by using Shift + F1 within CBMS
- Read all CBMS Communications
  - If you are not signed up for communications, contact [PC.HELPDESK@state.co.us](mailto:PC.HELPDESK@state.co.us)



# Where to Get More Information

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- HCPF Website -  
[Colorado.gov/hcpf](http://Colorado.gov/hcpf)
- Medicaid Eligibility Email Address -  
[Medicaid.eligibility@hcpf.state.co.us](mailto:Medicaid.eligibility@hcpf.state.co.us)
- CHP+ Eligibility Email Address -  
[CHP+.eligibility@hcpf.state.co.us](mailto:CHP+.eligibility@hcpf.state.co.us)



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**Thank You  
for  
Your Time!**

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